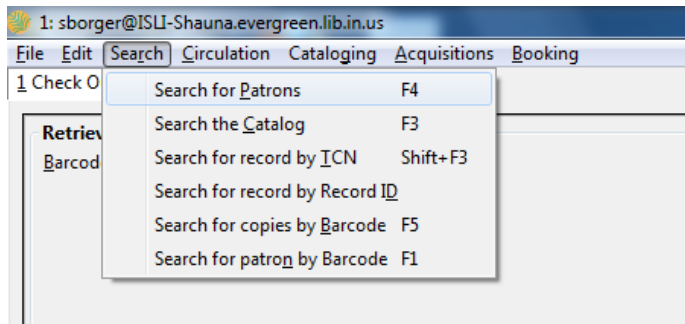# Chapter 3: Registering Patrons

1) Registering Patrons/Staff

To register a new patron, we will begin by accessing the Searching the database to make sure they do not already have an Evergreen Indiana library card.

Search for the patron's name (F4) by navigating to Search and choosing Search for Patrons.

Make sure to choose *Everywhere* and check the box next to *Include inactive patrons?* so as not to leave any possible duplicate records out of your search results.

If accounts with similar or identical names are returned in the search results, the identification and address information of the applicant should be compared to the information in the existing accounts. In the event there is no identification information in the existing account, the home library should be contacted to ascertain if there is non-electronic "legacy" data that did not migrate but which is still retained at the library that may help resolve whether there is or is not an account already in the applicant's name.

If there is no previous library card, proceed with registering the patron by navigating to "Circulation" menu and selecting "Register Patron."

User Identification

The first step to registering a patron is to scan or enter the barcode from the library card you are assigning the new patron. This can be done manually or using a barcode scanner.

After entering the barcode and hitting the tab key, the OPAC/Staff Client username field will automatically populate with the barcode. This can be changed by the circulation staff, if the patron has a username they would like to use, or it can remain the barcode.

A 4-digit Password is automatically assigned to the patron. This will be their temporary password to access the "My Account" section of the Online Catalog. After successful registration of a patron, the staff member will be unable to view the Password for confidentiality purposes. If a patron does not remember their Password at a later date, the staff member must choose Reset Password, write it down, save the patron record and give the new Password to the patron.

Patron registration definitions

Enter patron information in capital letters according to the Evergreen Indiana Circulation Procedures.

Barcode (Required): Library Card Barcode Number

OPAC/Staff Client User Name (Required): Same Number as Above Field

Password (Required): Generated by System. Patron uses this number to log into their My Account in the OPAC.

Verify Password (Required): Same as Above Field

First Name (Required): Patron's First Name

Middle Name (Optional): Patron's Middle Name

Last Name (Required): Patron's Last Name

Suffix/Title (Optional): Senior, III

OPAC/Staff Client Holds Alias (Optional): This can be a nickname applied to a group of people for whom services need to be grouped together. Example: Bookmobile patrons at each location.

Date of Birth (Required): Patron's Date of Birth entered with the following format: YYYY-MM-DD

Juvenile (Optional): Check if you want to indicate that the patron is a juvenile.

Primary Identification Type (Required): Driver's License or Other

Primary Identification (Required): Driver's License or Other ID number

Parent/Guardian (Optional): If the patron is a juvenile and you want to link their account to a patron or guardian's account.

Email Address (Optional but desired): Patron email address. NOTE: Please enter the email address in regular caps.

Daytime Phone (Optional): Patron phone number

Evening Phone (Optional): Patron phone number

Other Phone (Optional): Patron cell phone or other residence phone number

Home Library (Required): Choose your library abbreviation from the dropdown menu.

Main (Profile) Permission Group (Required): Patron borrowing privilege profile. See the Evergreen Indiana Circulation Procedures for more information about assigning profiles.

Privilege Expiration Date (Required): Becomes automatically populated upon choosing a patron profile. See the Evergreen Indiana Circulation Procedures for more information about how long each card is valid.

Internet Access Level (Optional): Only applicable if library uses a computer login software such as PC Cop.

Active: Default is checked. If a patron account expires, staff members can un-check this option to prevent the patron information from being included in statistics on active patrons.

Barred: Default is un-checked. Staff members can manually check this box to prevent a patron from checking out. An alert will also be displayed in the patron account which will notify staff members that the patron has been barred.

Is Group Lead Account: Default is un-checked. Staff members can check this box and Save & Clone the account to create a subordinate patron account. Those accounts will then be linked.

Claims-Returned Count: Staff members can mark an item Claims Returned and it will be reflected in the patron account.

Claims Never Checked Out Count: Staff members can mark an item Missing and it will be reflected in the patron account.

Alert Message: Any text entered here will display as soon as the patron account is opened.

Hold is behind Circ Desk: Staff members can manually check this box and an alert will be reflected in the patron account.

Address: Please enter address information in all caps.

Statistical Categories

Statistical Categories must be set by each library from the Local Administration screen in order to take advantage of gathering the information when registering staff. See Reports Module, Statistical Categories.

Circ staff can chose what StatCats to place patrons into based on guidelines laid out by their particular library.

Surveys

Surveys can be set on a Consortium wide basis, or on a library by library basis.

From this screen, Circ Staff can record patron's answers to any surveys in progress at that time.

Finishing

The last step to registering a patron is "Finish"

Staff can Save, Clone or Cancel the registration.

Typically, Save will be the choice. One circumstance where you might "clone" a user is if a mother and daughter come in to receive a library card. You can create the mother's account and "clone" her account to automatically populate fields like addresses and phone numbers to save time. Cloning also groups all clones of that particular user as children belonging to the lead account.

After clicking "Save User" you will see the following message, signifying that the user has been created successfully.